

## DEPARTMENT OF AGING

1600 K STREET  
 SACRAMENTO, CA 95814-4020  
 Internet Home Page: [www.aging.ca.gov](http://www.aging.ca.gov)  
 TDD Only 1-800-735-2929  
 FAX Only (916) 327-3661  
 (916) 324-1900



# PROGRAM MEMO

TO: Area Agencies on Aging (AAA) Directors	NO.: <b>PM 03 – 16 (P)</b>
SUBJECT: <b>Instructions for the Area Plan Year-End Report for the Planning Period Fiscal Year (FY) 2002-03</b>	DATE ISSUED: <b>July 24, 2003</b>
	EXPIRES: <b>Until Superseded</b>
REFERENCES: <b>PM 00-21 (P)</b>	SUPERSEDES: <b>PM 95-20 (P)</b>
PROGRAMS AFFECTED: <input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Title III-B <input checked="" type="checkbox"/> Title III-C1/C2 <input checked="" type="checkbox"/> Title III-D <input checked="" type="checkbox"/> Title III-E <input checked="" type="checkbox"/> Title V <input checked="" type="checkbox"/> CBSP <input type="checkbox"/> MSSP <input checked="" type="checkbox"/> Title VII <input type="checkbox"/> ADHC <input type="checkbox"/> Other: _____	
REASON FOR PROGRAM MEMO: <input type="checkbox"/> Change in Law or Regulation <input type="checkbox"/> Response to Inquiry <input checked="" type="checkbox"/> Other Specify: <b><u>Update Requirements</u></b>	
INQUIRIES SHOULD BE DIRECTED TO: <b>Your Assigned AAA-Based Team</b>	

The purpose of this Program Memo is to convey to AAAs the “Instructions for the Area Plan Year-End Report for the Planning Period FY 2002-03.” The California Department of Aging (CDA) uses the Area Plan Year-End Report when reporting to federal and State officials on AAA activities, achievements, and significant barriers to local goals.

## Overview

The Reference Guide for the 2001-2005 Area Plan development [PM 00-21 (P)] states the purpose of the Year-End Report is to provide a retrospective account of progress made toward specified goals during the preceding FY. The Year-End Report provides a performance report for the community and CDA. It reaffirms the important role of the AAA as the advocate, planner, and administrator of programs for seniors and functionally impaired persons in their local Planning and Service Areas.

A Year-End Report may be used to inform the public about: 1) the AAA’s key activities during the preceding year, 2) significant achievements during the preceding year, and 3) the most significant difficulties the AAA has encountered in executing its charge. It is similar, in this respect, to a corporate annual report.



CDA has determined that the Year-End Report satisfies the following Older Americans Act area plan requirement at OAA, Section 305(a)(5)(iii) and 305(a)(5)(iii)(III):

“With respect to the fiscal year preceding the fiscal year for which such plan is prepared . . . provide information on the extent to which the area agency on aging met the objectives described in clause (i) . . . the Area Plan.”

### **Format and Content**

The format and content of the Area Plan Year-End Report is to follow the guidance provided in PM 00-21 (P), which is summarized below:

- A. The Year-End Report may be written using either a narrative or objective-by-objective format.
- B. The final Year-End Report, submitted at the end of the four-year planning cycle, should include a discussion of the known impact of activities undertaken during the entire planning cycle.
- C. The Year-End Report should include discussion of completion, non-completion, and/or change of stated measurable objectives set for the preceding year. Circumstances which affected progress towards specific goals, resulting in revised objectives should be addressed.
- D. AAAs who expended any amount of funds for Program Development and Coordination (PD&C) during the period covered by the Year-End Report, must include a discussion of their PD&C accomplishments. The discussion should clearly indicate what objectives were achieved, deleted, or extended into a later FY. Any accompanying narrative should clearly describe the reasons for the particular status of each objective. The information regarding progress toward PD&C objectives will assist the Department in reviewing the cost claimed for PD&C in the Financial Closeout for the applicable FY.
- E. Content should be specific and identified to allow for linking or cross-referencing with specific objectives stated in the Area Plan.

### **Transmittal**

- An original and two copies of the Year-End Report and the transmittal letter are sent to the AAA's assigned AAA-Based Team.
- The letter of transmittal must be dated and signed by the AAA Director, the Governing Board Chair, and the Advisory Council Chair.
- The Year-End Report is due annually, no later than August 31. The Area Plan Year-End Report for FY 2002-03 is due no later than **August 29, 2003**.

A separate Year-End Report will not be required for the Title III E Family Caregiver Support Program for FY 2002-03.

**Original Signed By Lynda Terry**

Lynda Terry  
Director